

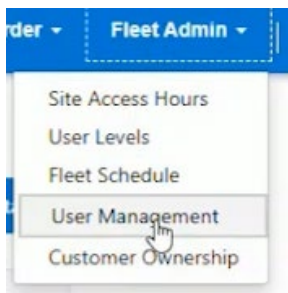
User Management lets a Fleet Administrator view members of the fleet, create new contacts, and control each contact's portal access. This guide covers viewing contacts and onboarding or removing portal access. There are three user categories:

- Fleet Manager/Administrator – full access to all functions on the portal; can be more than one
- Fleet Delegate – has limited access to functions and approval limits
- Driver – has limited access to functions on the portal

Note: Portions of application pages are grayed/blurred out to conceal and protect identities.

Opening User Management

1. In the top navigation bar, click **Fleet Admin**, then click **User Management**.



2. Review the list of fleet contacts. Use the **Search** box to find a specific member, or click **New Contact** to add one.

 A screenshot of the 'User Management' page. The page has a blue header with navigation links: Service Appointments, TA Locations, Work Order, Fleet Admin, and a user profile icon. Below the header, the title 'User Management' is centered. To the right of the title is a search box with a magnifying glass icon and a 'New Contact' button. Below this is a table with four columns: FIRST NAME, LAST NAME, COMPANY NAME, and CUSTOMER USER CATEGORY. The table contains 10 rows of contact information. At the bottom of the table is a pagination control showing page 1 of 5.

FIRST NAME	LAST NAME	COMPANY NAME	CUSTOMER USER CATEGORY
Clark			
Jesus			
Jane			
Mahima			
Sandra			Admin
Bhargav			Delegate
James			
John			
Cynthia			
Akriti			

User Management shows the contacts within your account. From here you can on-board or off-board them from portal access and set the type of access.

Viewing a Contact's Details

3. In the contact list, click a contact's name to open the **Contact Details** page.
4. Review the contact's information, including the **Service Account** and the **Portal Access** status.

The screenshot displays the 'Contact Details' page in the eSHOP2.0 system. The page has a blue header with navigation links: Service Appointments, TA Locations, Work Order, Fleet Admin, and a user profile icon. The main content area is titled 'Contact Details' and contains several input fields and a dropdown menu. The 'FIRST NAME' field contains 'Clark', 'LAST NAME' contains 'Jones', 'MOBILE PHONE' is empty with a placeholder 'Provide a telephone number', 'EMAIL' contains 'clark.kent123@test.com', and 'CUSTOMER USER CATEGORY' is a dropdown menu with 'Select' chosen. The 'SERVICE ACCOUNT' field shows 'Manager: Peter Thompson 101' with a search icon. The 'PORTAL ACCESS' section is highlighted with a red box and shows 'OnBoard'. At the bottom, there are three buttons: 'Submit', 'Onboard', and 'Remove Portal Access'. The footer indicates '© 2026 TA-Petro Truck Service'.

A Portal Access status helps you confirm whether a contact already has access to the portal – status of **Onboard**, and which account they are associated with. If their access has been added yet or has been removed, it will show **No Access** as the status.

Adding a New Contact / Fleet Member

5. To add a fleet member who has never had access, click **New Contact**. Fill in the required information.

The screenshot shows the 'New Contact' form in the eSHOP 2.0 interface. The form is titled 'New Contact' and is located under the 'Fleet Admin' tab. It contains several input fields: 'FIRST NAME *', 'LAST NAME', 'MOBILE PHONE' (with a placeholder 'Provide a telephone number'), 'EMAIL *', 'CUSTOMER USER CATEGORY' (a dropdown menu with 'Select' as the current value), and 'SERVICE ACCOUNT *' (with a placeholder 'Please Select Account'). There is also a 'PORTAL ACCESS' section with a 'No Access' option. A 'Submit' button is at the bottom left. The footer shows '© 2026 TA-Petro Truck Service'.

At this point, the contact has been created, but needs to be granted access.

6. Click **Onboard** to give portal access to the new contact.

The screenshot shows the 'Contact Details' form in the eSHOP 2.0 interface. The form is titled 'Contact Details' and is located under the 'Fleet Admin' tab. It contains the same input fields as the 'New Contact' form, but with pre-filled values: 'FIRST NAME *' is 'Samuel', 'LAST NAME' is 'Jones', 'MOBILE PHONE' is '123-456-1133', 'EMAIL' is 'sjones@truckservice.com', and 'CUSTOMER USER CATEGORY' is 'Admin'. The 'SERVICE ACCOUNT *' field still has the placeholder 'Please Select Account'. The 'PORTAL ACCESS' section now has three buttons: 'Submit', 'Onboard' (which is highlighted with a mouse cursor), and 'Remove Portal Access'. The footer shows '© 2026 TA-Petro Truck Service'.

The new contact will receive an email with instructions on how to log into the portal.

Removing Portal Access

7. On the **Contact Details** page, revoke access by clicking **Remove Portal Access**.

Contact Details

FIRST NAME *
Clark

MOBILE PHONE
Provide a telephone number

LAST NAME
Jones

EMAIL
clark.kent123@test.com

CUSTOMER USER CATEGORY
Select

SERVICE ACCOUNT *
Remove Portal Access

PORTAL ACCESS
OnBoard

Submit Onboard **Remove Portal Access**

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8. Click **Submit** to save your changes.

Remove Portal Access

This site is private: Only specific people can view this site. [Learn more](#) Signed in as [User]

Submitter

RELATED CONTACT
Clark Jones

REQUEST TYPE
Offboard

Are you sure you want to remove access for this user?

Submit

This Fleet Member will not be able to log in. You can onboard if they need access again.